

Smart Tiles User and Admin Manual



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1 INTRODUCTION

Smart Tiles is prepared to be used by Admin user who prepares application and performs necessary setup steps and Standard user who benefits from the application provided prefilled data objects.

2 USERS and PERMISSION SETS

We created two types of PS:

- **Smart Tiles Administrator** – allows you to see Smart Tiles Settings tab, edit customization, choose objects and their fields to be displayed
- **Smart Tiles User** – allows you to see Smart Tiles Tab and pre-filled objects

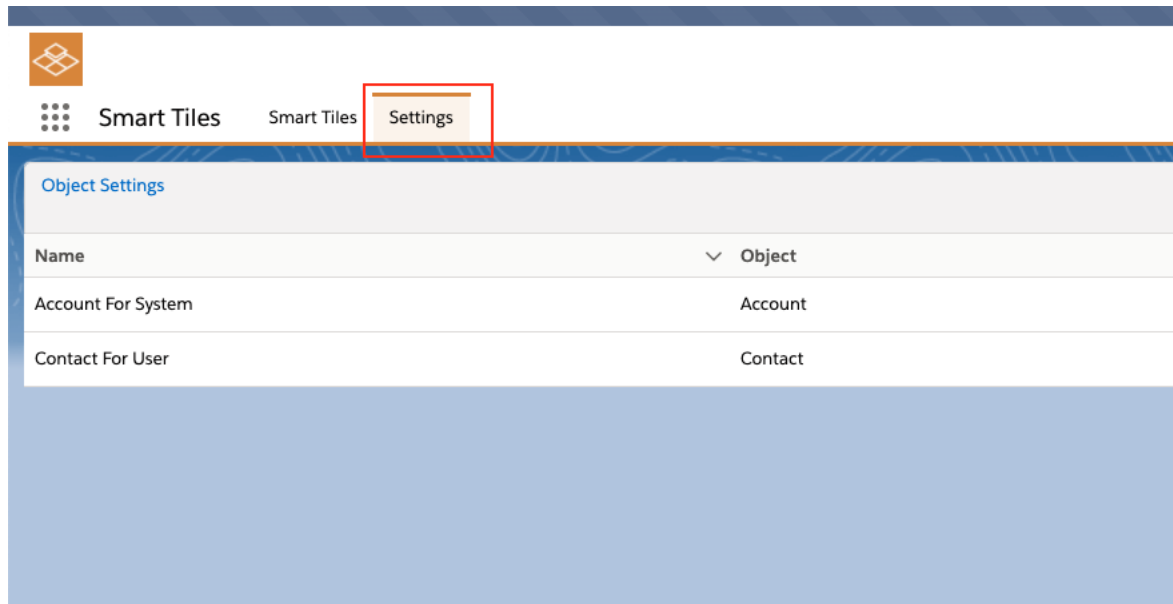
3 ADMIN – Main Setup steps

Prerequisites:

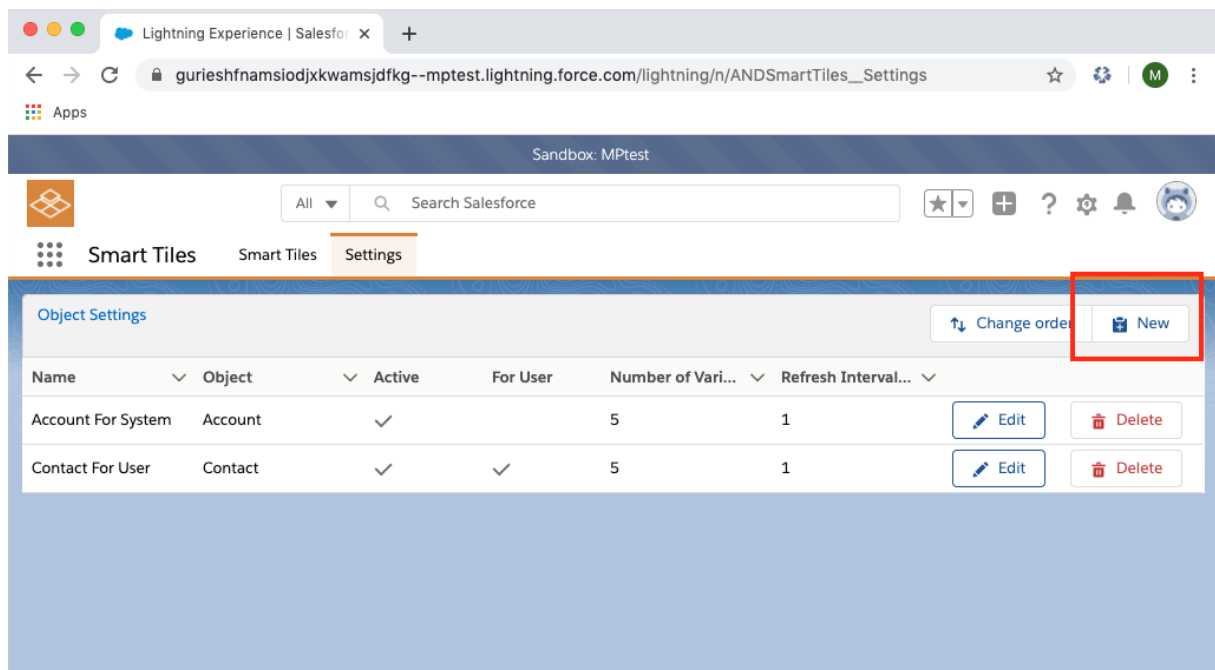
- Smart Tiles Administrator Permission Set is assigned to Admin

To prepare the Smart Tiles App, follow these steps:

1. Open the application called “Smart Tiles” or add Smart Tiles Settings tab to your usually used applications and open it.
2. Click on the „Settings“ tab.



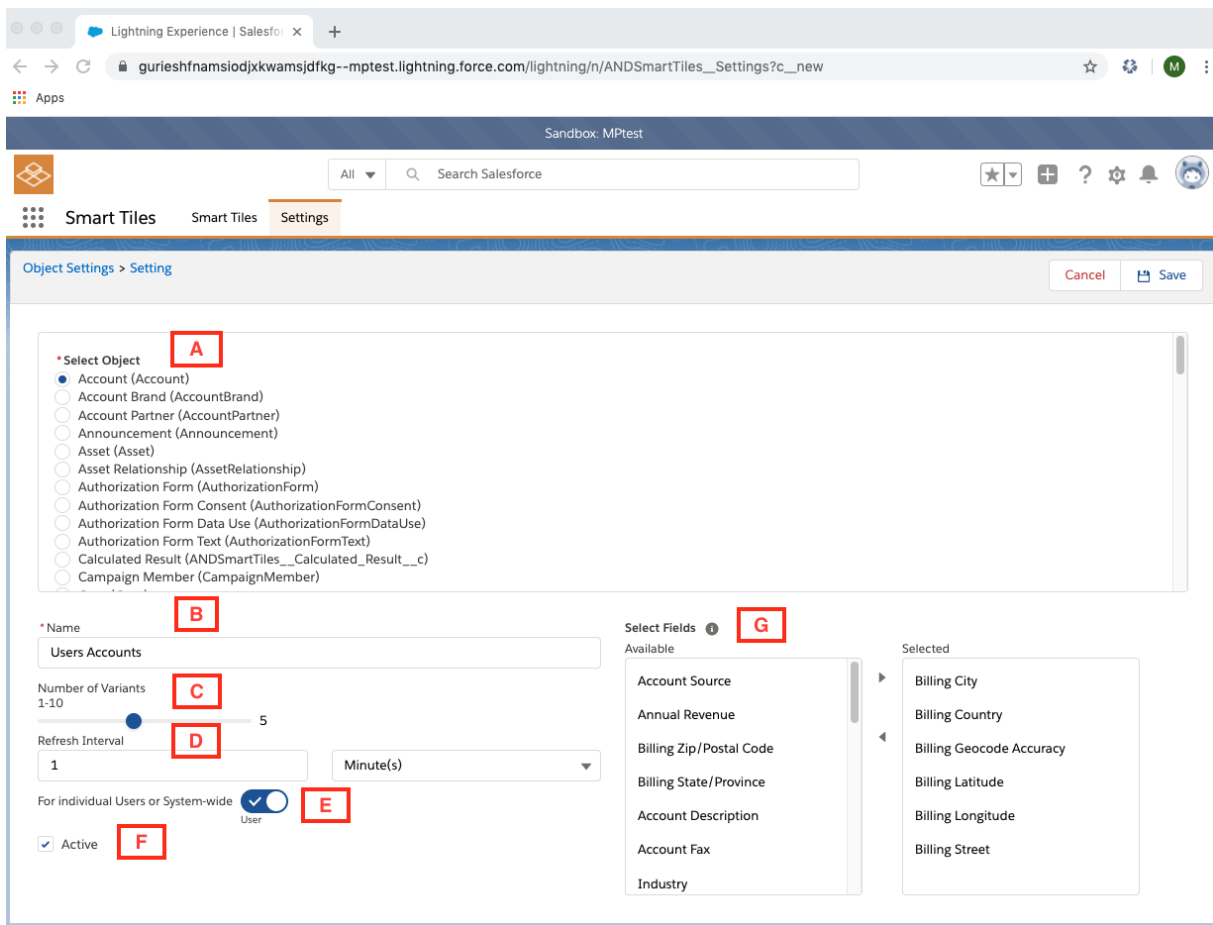
3. Add a new customization object by clicking on the „New“ button.



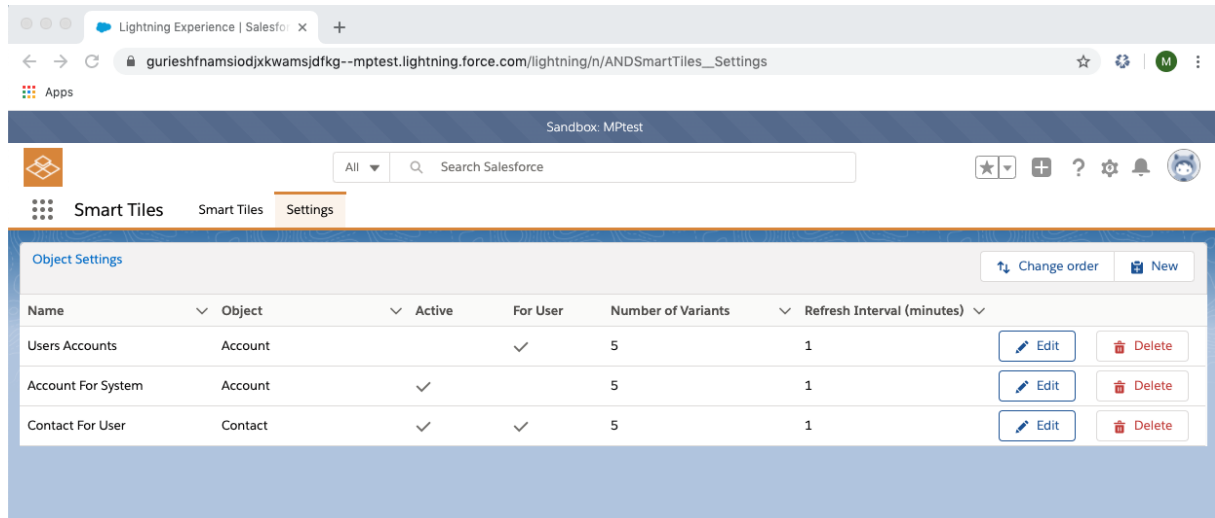
4. Now you should fill all customization fields:

- At first, choose an object to be created.
- Then name it – This name will the user see in Smart Tiles Tab, so choose appropriately. If you decide to change it, you can do it later.

- c. Choose the number of tiles (variants) you want to create. For the first setting, try four pieces. You can edit the number of pieces later by adding or deducting them.
- d. Set refresh interval. Refresh interval means, how often will prefilled records recalculate. At first, try 1-hour interval and then you can change it.
- e. Switch controller to be „User“ or „System-wide“.
- f. Check the „Active“ checkbox. Users can see only active objects. You can customize as many objects as you want, but in the free version, there can be only two active objects at the same time.
- g. Select fields from the selected object you want to be prefilled in the tiles.



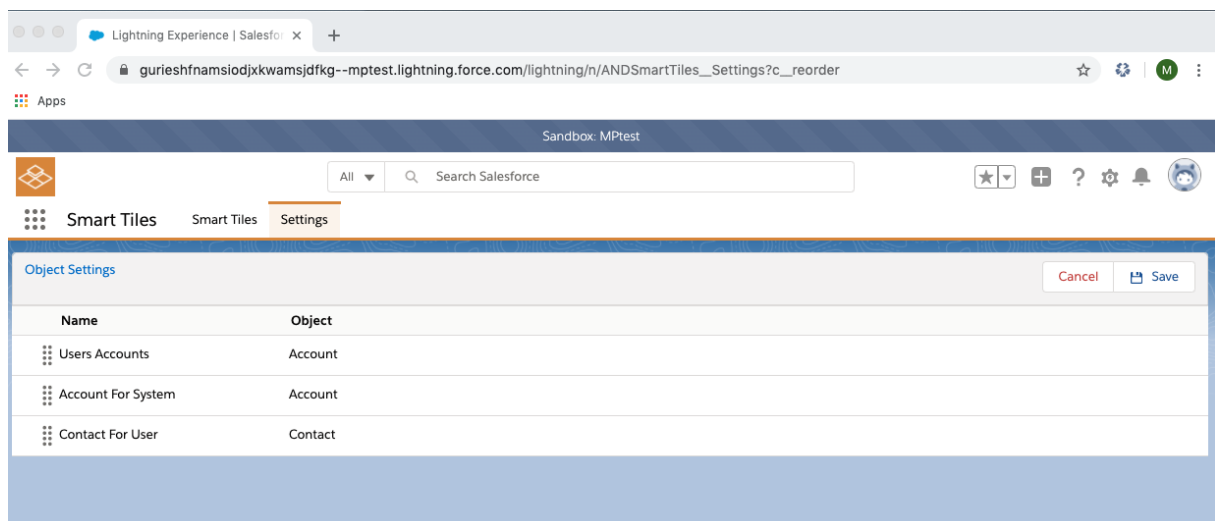
5. Click the „Save“ button in upper right corner to save changes.
6. Great, you created your first object to available in Smart Tiles.
7. Now you can repeat the same steps to create other objects.
8. You can edit all objects by clicking on the „Edit“ button in the object row or erase by clicking the „Delete“ button next to it.



Object Settings

Name	Object	Active	For User	Number of Variants	Refresh Interval (minutes)	
Users Accounts	Account		✓	5	1	Edit Delete
Account For System	Account	✓		5	1	Edit Delete
Contact For User	Contact	✓	✓	5	1	Edit Delete

9. You can also reorder the tiles. Click on the „Change order“ button in the upper right corner. Eight grey dots should appear next to Settings Name.



Object Settings

Name	Object	
Users Accounts	Account	
Account For System	Account	
Contact For User	Contact	

10. Just drag-and-drop the row to the chosen position.

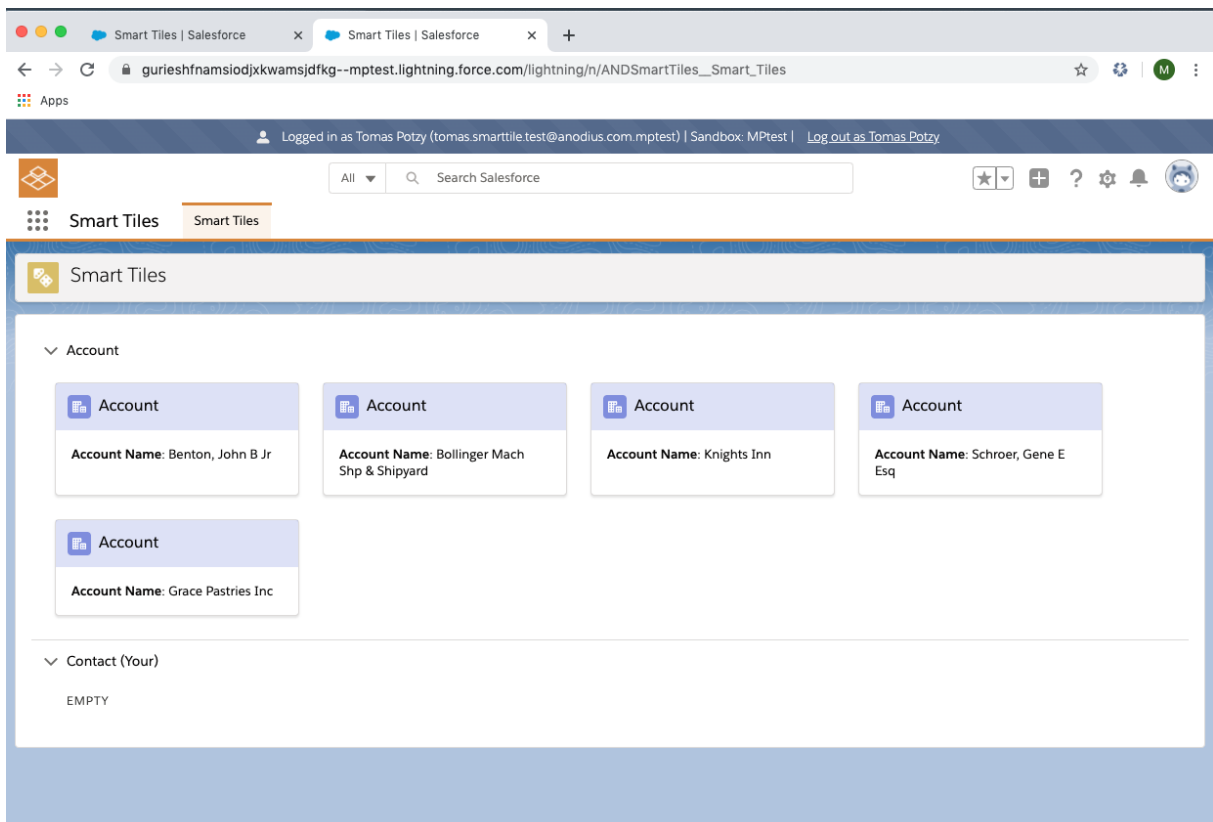
4 USERS – Standard usage

Prerequisites:

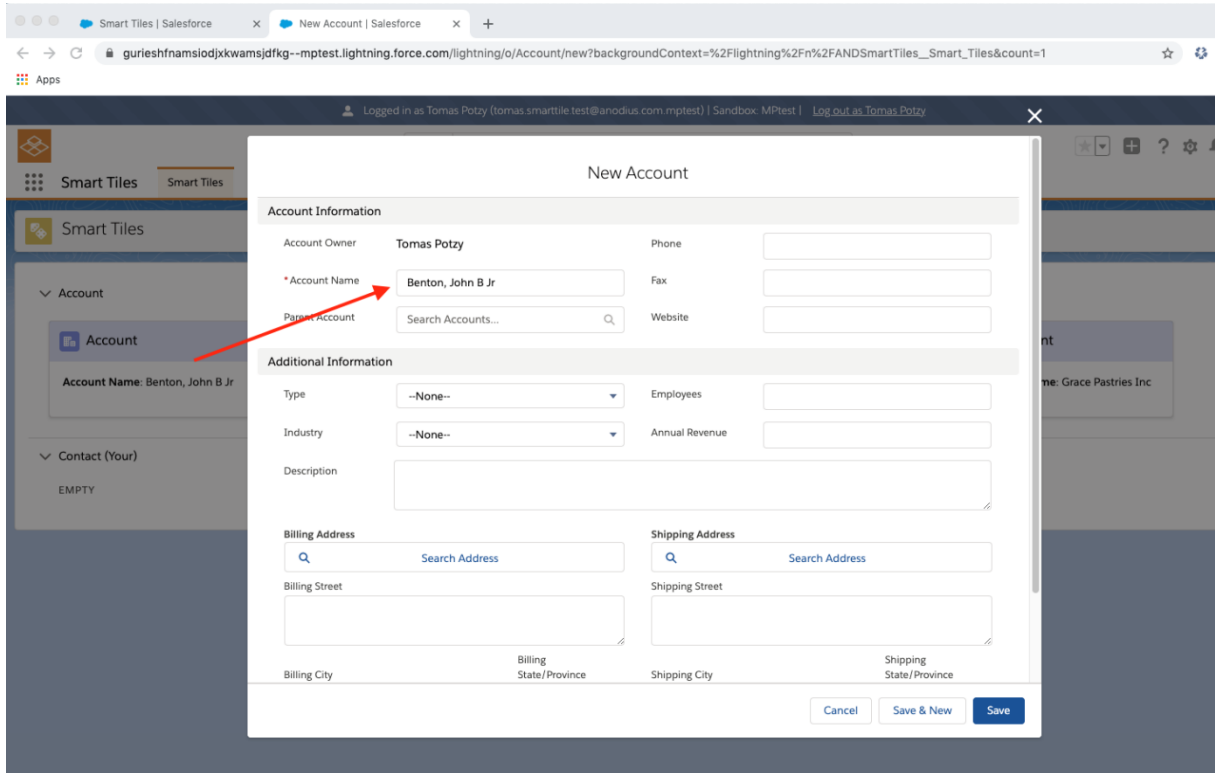
- Smart Tiles User Permission Set is assigned to the user
- Customization steps from chapter 4 were executed

Steps to follow:

1. Open the application called Smart Tiles or ask Admin to add Smart Tiles Settings tab to your usually used applications and open it.
2. Click on the „Smart Tiles“ tab to open it.
3. Now you see objects with their variants Admin chose in the customization. Object names with „Your“ text in parenthesis are the objects created by you. If you see „EMPTY“ in place of variant tiles, it means there are no created objects in the system yet.



4. Click on the tile you want to create a real object of any variant. Standard edit screen opens with prefilled values from the tile. Add other necessary fields or edit it and save.



5 ADMIN – Utility bar Setup

To add the Smart Tiles app to the utility bar (Utility Items) follow the steps below:

1. Open Setup, then look up „App Manager“, find the app you would like to add Smart Tiles as Utility Item.

Salesforce is rolling out security enhancements that can impact your

Setup Home Object Manager

app

New Salesforce Mobile App QuickStart

Data

Mass Transfer Approval Requests

Apps

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Lightning Experience on iPad Browsers (Beta)

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Lightning Experience App Manager

24 Items - Sorted by App Name - Filtered by all appmenuitems - TabSet Type

App Name	Developer Name	Description
5	Community	Salesforce CRM Communities
6	Consumer Goods	Retail Manage your retail inventory, promotions, planograms and other instore activities
7	Content	Salesforce CRM Content
8	Force.com	Start Here
9	Lightning Usage App	LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience
10	Marketing	Marketing Best-in-class on-demand marketing automation
11	Platform	Platform The fundamental Lightning Platform
12	Sales	Sales The world's most popular sales force automation (SFA) solution
13	Sales	LightningSales Manage your sales process with accounts, leads, opportunities, and more
14	Sales Console	LightningSalesConsole (Lightning Experience) Lets sales reps work with multiple records on one screen
15	Salesforce Chatter	Salesforce1_for_Windows Salesforce Chatter gives Windows 10 users an installable app for collaborating with coworkers over Chatter. Salesforce
16	Salesforce CMS	SalesforceCMS Manage content and media for all of your sites.
17	Salesforce Files	Salesforce_Chatterbox Manage and share files with real-time sync across devices. Built into Chatter to make files social. With the trust and sec
18	Salesforce for Android	Chatter_for_Android Salesforce for Android gives you access to CRM, custom apps, collaboration, and business processes all together in a ur
19	Salesforce for iOS	Chatter_for_iOS Salesforce for iOS gives you access to CRM, custom apps, collaboration, and business processes all together in a unified
20	SalesforceA	SalesforceA You, the hardworking, multitasking Salesforce administrator, have spoken. We listened, and bring you SalesforceA. Use
21	Service	Service Manage customer service with accounts, contacts, cases, and more
22	Service Console	LightningService (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen
23	Site.com	Sites Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and publish
24	Smart Tiles	Smart_Tiles

https://smart-tiles-ver1-dev-ed.lightning.force.com/lightning/setup/connectedApps/Smart_Tiles

- Click on the arrow at the end of the chosen row and click on the „Edit“.

18	Salesforce for Android	Chatter_for_Android	Salesforce for Android gi...	23/01/2020, 16:48	Connected (Managed)	▼
19	Salesforce for iOS	Chatter_for_iOS	Salesforce for iOS gives y...	23/01/2020, 16:48	Connected (Managed)	▼
20	SalesforceA	SalesforceA	You, the hardworking, m...	23/01/2020, 16:48	Connected (Managed)	▼
21	Service	Service	Manage customer servic...	13/11/2019, 15:26	Classic	▼
22	Service Console	LightningService	(Lightning Experience) L...	13/11/2019, 15:26	Lightning	▼
23	Site.com	Sites	Build pixel-perfect, data-...	13/11/2019, 15:26	Classic	▼
24	Smart Tiles	Smart_Tiles		30/03/2020, 13:17	Lightning	▼

- In the left menu, choose the „Utility Items“. Click on the „Add Utility Item“ and find smartTileAuraContainer then click on it.

Lightning App Builder App Settings Pages Smart Tiles

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles
- App Performance (Beta)

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#)

Search...

- Recent Items
- Report Chart
- Rich Text
- Visualforce
- Custom (1)
 - smartTileAuraContainer**
- Custom - Managed (0)

No components available.

Enter that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

To enable the utility bar for this app, add a utility item.

- Change the „Label“ of Utility Item, „Panel Width“ and „Panel Height“ (try values from the image) and check the „Start automatically“ checkbox to have Smart Tiles prepared when users are logged in. Click Save to confirm.

Lightning App Builder App Settings Pages Smart Tiles Back Help

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Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#)

Smart Tiles

PROPERTIES smartTileAuraContainer

Utility Item Properties

- *Label Smart Tiles
- Icon fallback
- Panel Width 800
- Panel Height 600
- ☒ Start automatically

6 USERS – Benefit from Smart Tiles in Utility bar

Prerequisites:

- Permission Set Smart Tiles User is assigned to the user
- Customization steps from chapter 6 were executed

Using Smart Tiles from Utility bar:

1. Click on the „Smart Tiles“ in the Utility bar in the lower-left corner. Then you will see the prefilled objects tiles. You can access it from any app in the system where your Admin has allowed it.

